



DELBERT HOSEMAN
Secretary of State

Mississippi Secretary of State

The Lobbying Online Reporting System

Lobbyist User Guide



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Introduction

The Lobbying Online site is designed to provide filing search functionality to the general public and online filing to registered users.

Registering as a Lobbyist

While you can search for reports without logging in to the Lobbying Online Site, you must log in to submit filings.

To log in to the Lobbying Online Site, you must be a registered user.

1. In your web browser, go to <https://sos.ms.gov/elec/portal/mse12/page/onlineFiling/portal.aspx>
The Elections home page displays.

2. The *Registered Lobbyist* login screen displays.
3. Click the **(New Users)** button.





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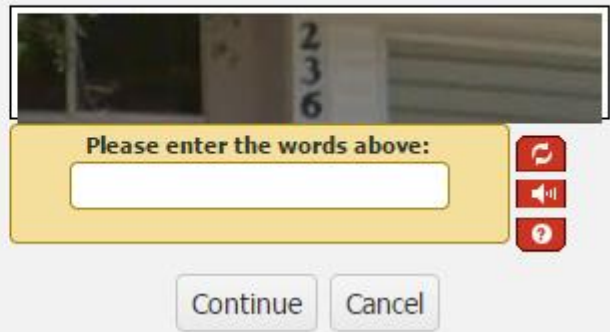
4. A *Create Lobbyist Account* screen displays.
5. Please enter the words above the text box, type the words displayed in the box immediately above.

This is to verify that you are a person and not an automated program attempting to gain access to the system.

Create Lobbyist Account

Please verify you are a person by entering the text below

If you can't read the words in the picture, you can either click the  (Reload) button, which will automatically generate another set of words, or click the  (Audio) button, which provides a set of words for you to listen to and type for verification.

The screenshot shows a verification screen. At the top, there is a small image of a building with the numbers 2, 3, and 6. Below the image is a yellow box with the text "Please enter the words above:" and a white text input field. To the right of the input field are three red buttons: a reload button, an audio button, and a help button. Below the yellow box are two buttons: "Continue" and "Cancel".

6. Click the **(Continue)** button.
7. A form for gathering personal information displays.
8. Fill out the form.



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Name Information

Title

First Name

Middle Name

Last Name

Suffix

Physical Address Information

Address 1

Address 2(eg: Suite# 201)

City

State

Zip

☐ Mailing address same as Physical

Mailing Address Information

Address 1

Address 2(eg: Suite# 201)

City

State

Zip

Phone Information

Primary Phone

Mobile Phone

Fax

Email Address Information

Email

Confirm Email

The e-mail address you enter will also be your username.

Cancel

Confirm

Type your information into the boxes provided, and remember that the *e-mail address you enter will be your username*

- Click the **(Confirm)** button when all information has been entered.



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10. When the Account Created screen comes up click the **(Close)** button.
11. Check your email at the email address you provided. There should be a new message in your inbox with a temporary password.

Thank you for creating an account with the Mississippi Secretary of State's office. system are below.

USERNAME: slamb@dorgersoft.com

PASSWORD: 9vV8nE

You will be required to change your password upon your first login.

12. You will need the temporary password ready for the next step.

Registered Lobbyist

Login in to submit or renew licenses

Username:

Password:

Login

Forgot Password?

New Users

15. Enter your Username (*email address*) and Temporary Password and click the (Login) button. The next step will allow you to change the Temporary Password to one you create.



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Password Change Required

Change Password
User passwords cannot be blank. Password are case sensitive. Password has expired. Please update your password below:

Old Password:

New Password:

Confirm Password:

16. Enter your Temporary Password in the Old Password box.
15. Enter a new the password that you create in the New Password box, and once again into the Confirm Password box.
16. The password you enter into the New Password (Confirm) box must match the password you entered into the New Password box perfectly.
17. Click the **(Update)** button.



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Tabs-Lobbyist

Across the upper part of the Online Filing page are tabs where you may navigate between current **Clients**, **Pending Clients**, **Terminated Clients**, and your **Profile**.

Client(s)

The *Client(s)* tab is automatically open upon login. You may navigate back to this tab by clicking on it.

Online Filing

Client(s)

Pending Client(s)

Terminated Client(s)

My Profile

Register A Client

Register Client(s)

You have 0 pending client(s)

Click 'Details' link to review the registration and Create/Submit Lobbyist Reports.

Lobbying Year

2016

No Client Registrations for Selected Year

Here you may register clients, view current clients, file a report.



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Pending Client(s)

Click on the *Pending Client(s)* tab to view client registrations that are incomplete or not paid for yet.

Payment must be received within 10 days of registration or the client will be removed from your profile and you will have to register the client again. State law prohibits you to lobby for clients in the list below until your payment has been received.

My Pending Client Registrations

☐ Select All

Description	Create Date
<input checked="" type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Architects, Inc.	02/06/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays	02/04/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays	02/04/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: TK Super Fun Testing Company	01/29/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	01/13/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Architects, Inc.	01/12/2015
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	12/19/2014
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: Dorger Client Test10	10/10/2014
<input type="checkbox"/> Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 1	02/04/2014

Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete.

At this point you may Submit Payment, Edit/Change, or Delete the client registration.

1. Click the **(Submit Payment)** button to be redirected to the Mississippi Payment Gateway.
2. Or click the **(Edit/Change)** button to go to the name, address and contact information page to make any changes or corrections and continue from there.
3. If you wish to delete the client registration click the **(Delete)** button.



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My Profile

Click on the **My Profile** tap to Update, Change or View your profile.

The screenshot shows a navigation bar with four tabs: 'Client(s)', 'Pending Client(s)', 'Terminated Client(s)', and 'My Profile'. The 'My Profile' tab is selected and highlighted in blue. Below the tabs is a dark blue header with the text 'My Profile'. Underneath the header are three buttons: 'View/Update My Profile', 'Update Preferences', and 'Change Password'.

Click the **(View/Update My Profile)** to go to your general information page and update your name, address, and phone information. If you need to change your password at any time click the **(Change Password)** button.

The screenshot shows a dialog box titled 'Password Change Required' with an orange header. Inside the dialog, there is a section titled 'Change Password' with the following text: 'User passwords cannot be blank. Password are case sensitive. Password has expired. Please update your password below:'. Below this text are three input fields labeled 'Old Password:', 'New Password:', and 'Confirm Password:'. At the bottom of the dialog are two buttons: 'Update' and 'Cancel'.

1. Enter your old password into the first box
2. Enter a new password that you create into the second box
3. Enter the new password again into the third box to confirm. *When you enter the new password into the second and third boxes they must match perfectly.*
4. Click the **(Update)** button to complete the password change.



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Register a Client

When logged in as a Lobbyist you may register Clients.

1. Under the **Client(s)** tab In the Register A Client box click the **(Register Client(s))** button.

Client(s)

Pending Client(s)

Terminated Client(s)

My Profile

Register A Client

Register Client(s)

You have 9 pending client(s)

Click '**Details**' link to review the registration and Create/Submit Lobbyist Reports.

Lobbying Year **2016**

No Client Registrations for Selected Year

- Enter your Client's company name in the box provided for Entity Name.

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Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:



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Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

- Enter your client's company name and click the **(Search)** button.



Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

Entity Name	Address	Contact	Contact Details
Mary Poppins Nannies Inc. of Greater Mississippi	440 Cedars of Lebanon Jackson, MS 39206	Robert Jacobs	Tel: 1-601-982-5783 Fax: 1-601-982-5847

If the record you are searching for is not in the list above or there are no matching records then click New to continue.

- Under the box marked Entity Name, Click on the [name](#) of your client's company to continue registration.



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Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:

No matching records were found.

If the record you are searching for is not in the list above or there are no matching records then click New to continue.

- If the client's company does not appear in the search results click the **(New)** button to continue.
- This takes you to a page to fill in the client's business address and contact information. *The client's address and contact information will not have to be filled out if you selected a company from the search results. If it is a new company or there are no matching records you will need to fill out the client's address and contact information.*



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Entity Name			
Name Captain Crunch			
Physical Address Information			
Address 1	Address 2(eg: Suite# 201)	City	State MISSISSIPPI ▼
			Zip
<input type="checkbox"/> Mailing address same as Physical			
Mailing Address Information			
Address 1	Address 2(eg: Suite# 201)	City	State MISSISSIPPI ▼
			Zip
Contact Information			
First Name	Middle Name	Last Name	
Title	Telephone 1	Fax	
Email	Confirm Email		
<div>CancelBackNext</div>			

- Fill in the Physical Address Information, Mailing Address Information (or click the [checkbox] next to *Mailing address same as Physical*), and Contact Information.
- When you are finished filling in the information, click the **(Next)** button to continue.



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- Fill in Client Business Details in the boxes provided.

Kind of Business of Lobbyist Client <input type="text"/>		<input type="checkbox"/> Client is an Agency of the State
President <input type="text"/>	Director 1 <input type="text"/>	Additional Business Membership: <div style="border: 1px solid black; height: 150px; width: 100%;"></div>
Vice President <input type="text"/>	Director 2 <input type="text"/>	
Secretary <input type="text"/>	Director 3 <input type="text"/>	
Treasurer <input type="text"/>	Director 4 <input type="text"/>	
<input type="button" value="Cancel"/>	<input type="button" value="Back"/>	<input type="button" value="Next"/>

- If the client is an Agency of the State click the [checkbox] at the top right.
- Click the **(Next)** button to continue to the Lobbyist Employment and Issues page.




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- Here you may enter Lobbying Issues and other Lobbyist employed by the Client.

Click on the boxes under Lobbying Issue to open a dropdown menu.

The screenshot shows a web form for client registration. It features three identical 'Lobbying Issue' dropdown menus, each currently set to '(none)'. To the right of the first dropdown is a 'Lobbying Begin Date' field with the value '2/6/2015' and a calendar icon. Below the first dropdown is a 'Lobbying Ending Date' field with the value '12/31/2015'. Further right is a large text area labeled 'Other Lobbyists in Mississippi Employed by Client'. At the bottom left are three buttons: 'Cancel', 'Back', and 'Next'. The 'Next' button is highlighted with a blue circle.

- In the dropdown menu you may choose from several Lobbying Issues.
- Click on the lobbying issue that applies to the client to select it.
- You may repeat this step in the other Lobbying Issue boxes to enter more lobbying issues if needed.
- In the box titled Other you may enter additional information
- In the Lobbying Begin Date box enter the date when the lobbying begins, or click on the  calendar button to bring up a calendar and choose a date from there.
- Enter the Lobbying Ending Date
- You may enter other Lobbyists in Mississippi Employed by the client in the box provided.
- Click the **(Next)** button to continue on to review and submit your client registration.



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- Review the client's information to be sure all is correct.

Client Information

Client Name :	Captain Crunch
Contact Name :	Captain Crunch
Telephone 1 :	(123)456-7890
Email :	captain@crunch.com

Physical Address

123 Mainstreet
Jackson, MS 39206

Mailing Address

123 Mainstreet
Jackson, MS 39206

Client Business Details
Kind of Business of Lobbyist Client : Cereal
President : Mary Poppins
Vice President :
Secretary :
Treasurer :
Director 1 :
Director 2 :
Director 3 :
Director 4 :
Client is an Agency of the State :
Additional Business Membership :

Lobbyist Employment and Issues
Lobbying Issue : Alcoholic beverages
Lobbying Issue : Business & Commerce
Lobbying Issue : Cemeteries and crematoriums
Other :
Lobbying Begin Date : 2/6/2015
Lobbying Ending Date : 12/31/2015
Other Lobbyists in Mississippi Employed by Client :

- If the information displayed is not correct click the **(Back)** button to go to the previous page and make any necessary changes.
- When you are sure all of the information is correct click the **(Submit)** button to continue.



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- Here you may choose to pay now, pay later or register another client.

A banner featuring the Secretary of State's seal on the left and a golden eagle with spread wings on the right, with the text "DELBERT HOSEMANN Secretary of State" in the center.

Check out?

Are you ready to check out or do you want to register another client?

- Click the **(Pay Now)** button to go to a page that will redirect you to the State of Mississippi Payment Gateway.
- Click the **(Pay Later)** button to save the client registration for later payment.
- Click the **(I want to register another client)** button to register another entity.



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[Pay Now](#)

A banner featuring the Secretary of State's seal on the left and a large golden eagle on the right, with the text "DELBERT HOSEMANN Secretary of State" overlaid.

Pay Now?

You are about to be redirected to the State of Mississippi Payment Gateway

Click the **(Next)** button to go to the State of Mississippi Payment Gateway.

[I want to register another client](#)

When you click the **(I want to register another client)** button you will be directed back to the first page where you may enter another entity.

Please enter your client's company name and click search. If your client does not appear in the search results you may click "new" to continue.

Entity Name:



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Pay Later

When you click the **(Pay Later)** button your client registration will be saved under the **Pending Clients** tab.

My Pending Client Registrations
☐ **Select All**

	Description
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Captain Crunch
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Archtects, Inc.
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: 1-800-HappyDays
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: TK Super Fun Testing Company
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Archtects, Inc.
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Client Test10
<input type="checkbox"/>	Lobbyist: Tara Lynn Kaeser ; Client: DSA Test Client 1

If payment is not received within 10 days of registration the client will be removed from your profile and you will have to register the client again.

Select a pending client registration by clicking the [checkbox] that corresponds with the filing you wish to complete.

At this point you may Submit Payment, Edit/Change, or Delete the client registration.

- Click the **(Submit Payment)** button to be redirected to the Mississippi Payment Gateway.
- Or click the **(Edit/Change)** button to go to the name, address and contact information page and continue from there.
- If you wish to delete the client registration click the **(Delete)** button.



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Filing Reports as a Lobbyist

1. Go under the *Client(s)* tab on the online filings page.
2. Choose the Lobbying Year you want to view from the lobbying year dropdown menu.
3. This will display a list of Client Registrations for that year.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

Register Client(s)

You have 10 pending client(s)

Click '[Details](#)' link to review the registration and Create/Submit Lobbyist Reports.

Lobbying Year **2015**

Certificate #	Description	Status	Effective Date	Expire Date
Details 20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Test Company	Filed - Verified	01/13/2015	12/31/2015

Print Preview

4. Click the [Details](#) link to review the registration and Create/Submit Lobbyist Reports. You will use this path to file Mid/End Session, Annual, and Termination Reports.

File a Report Submitted Reports Registration Info

New Reports

Create Mid/End Session Report Create Annual Report Download Lobbyist Expense Template

Pending Expense Reports
No Expense Reports Found

Click the (Download Lobbyist expense Template) button if you wish to import expenses from a spreadsheet later on.

5. There are tabs across the top labeled *File a Report*, *Submitted Reports*, and *Registration Info*
6. Under the *File a Report* tab notice the box titled *New Reports* where you will see the **(Create Mid/End Session Report)**, **(Download Lobbyist Expense Template)** and **(Create Annual Report)** buttons.



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Create Mid/End Session Report

- Click on the **(Create Mid/End Session Report)** button under the File a Report tab

The screenshot shows a web interface with three tabs: 'File a Report', 'Submitted Reports', and 'Registration Info'. The 'File a Report' tab is active. Below the tabs is a section titled 'New Reports' with a dark blue header. Under this header are three buttons: 'Create Mid/End Session Report' (which is highlighted with a blue border), 'Create Annual Report', and 'Download Lobbyist Expense Template'.

- If you are not ready to start a report Click the **(Cancel)** button to exit.

The screenshot shows a dialog box titled 'Form E Type'. It contains the question 'Is this the mid-session or end-of-session report?'. Below the question are three buttons: 'Mid-Session', 'End-of-Session', and 'Cancel'.

- Click the **(Mid-Session)** button to start a Mid-Session report, or click the **(End-of-Session)** button to start an End-of-Session report.
- The following steps cover both Mid-Session and End-of-Session reports.

Expenses Actions-(Mid/End-Session report)

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button.



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Expenses Actions


Add Expenses


Import From Spreadsheet


Download Lobbyist Expense Template

Add Expenses

1. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.
2. Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

Recipient <input type="text"/>	Recipient's Office Title Governor ▼
Date <input type="text"/> 	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award ▼
Item Description <input type="text"/>	Value/ Cost <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Type the date into the Date box or
click on the  calendar button to
bring up a calendar and select a
date.

Date
08/01/2014 

August 2014

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						



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3. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
4. After you click the **(Next)** button you will be taken back to the Form E – Mid-Session- Expense Report page that shows your newly entered Expense Item.

☐ Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input checked="" type="checkbox"/> Capt. Crunch	Judge	Feb 8 2015	Cereal Town	GM	Award	Frosted	\$10.00

☐ Select All

Total Value/Cost\$10

Expenses Count1

Edit Expense

Remove Expense

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.



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Import from Spreadsheet

Expenses Actions

Add Expenses Import From Spreadsheet Download Lobbyist Expense Template

1. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

2. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)** button.
3. Next you will come to a screen where you may choose a file from your computer

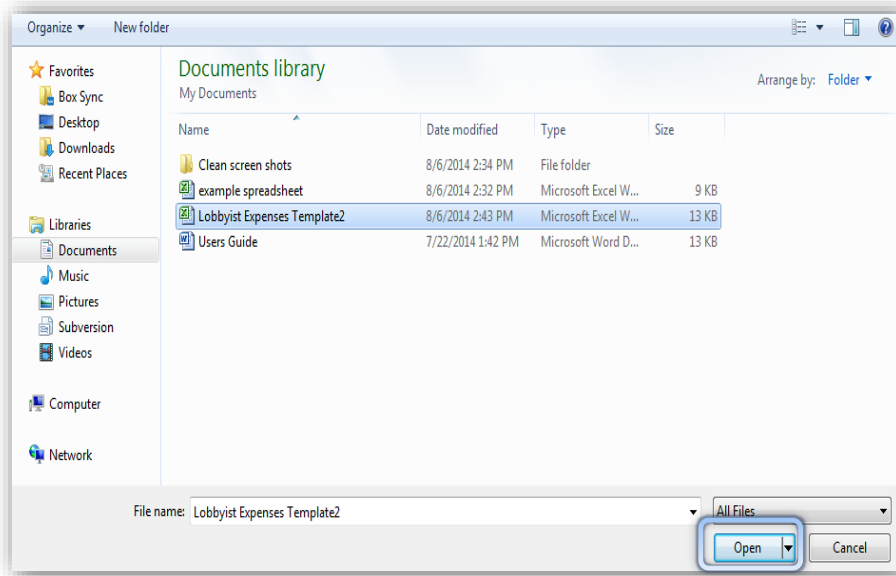
Please upload the Excel Template
Upload Excel Sheet (Click Upload to Continue)

Choose File No file chosen Cancel

4. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.

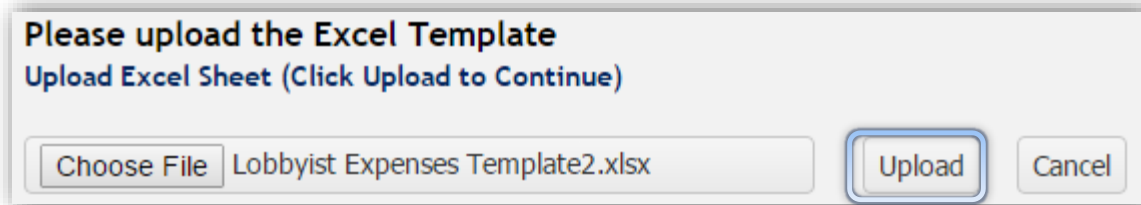


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Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.




5. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Mid/End-Session report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

- Type the date into the Date box or click on the  calendar button to bring up a calendar to select a date.
- Fill in the rest of the boxes
- Click the **(Next)** button when you are finished.



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2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.

☐ Select All

Date	Place/Location	Est. No. Public Officials	Est. Total Attendance	Total Reception Cost
<input type="checkbox"/> Feb 4 2015	Jackson MS	50	20	\$10

☐ Select All

Total Receptions Cost\$10

Receptions Count1

Edit Receptions

Remove Receptions

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.



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Report Actions-(Mid/End-Session report)

Report Actions

1. Click the **(Preview Report)** button to preview the report before submitting.

OR

2. Click the **(Submit Report)** button to continue to submit report.

Submit Report

You are about to Submit Expense Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

3. If you think that something needs to be changed or modified on the report click the **(Cancel)** button.
4. If you are sure that the report is correct click the **(Submit)** button.



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Lobbyist Expenses

Expenses submitted.

OK

- Click the **(OK)** button to continue.

[File a Report](#) **Submitted Reports** [Registration Info](#)

Submitted Reports

☐ Select All

	File Number	Report Type	Report Status	Date Created
<input type="checkbox"/> View/Print	LE20150011	Form E - Mid Session	Filed - Lobbyist Report	2/9/2015 11:47:38 AM
<input type="checkbox"/> View/Print	LE20150002	Form E - Mid Session	Filed - Lobbyist Report	1/19/2015 2:42:32 PM

[View/Print Report\(s\)](#) [Amend Report\(s\)](#)

- The Submitted Report can now be viewed under the Submitted Reports tab.
- To view or print the report, first click the [check box] that corresponds with the report, click the **(View/Print Report(s))** button. If there are changes that need to be made to the report, click the **(Amend Report(s))** button.



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Create Annual/Termination Report

1. Go under the **Client(s)** tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

Register Client(s)

You have 10 pending client(s)

Click '**Details**' link to review the registration and Create/Submit Lobbyist Report

Lobbying Year **2015**

Certificate #	Description
Details L20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software

3. This will display a list of Client Registrations for that year click on the **Details** link.
4. To create Annual or Termination reports click the **(Create Annual Report)** button.

File a Report Submitted Reports Registration Info

New Reports

Create Mid/End Session Report **Create Annual Report** Download Lobbyist Expense Template



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5. This will take you to the Form A Type page where you may choose between Annual or Termination Report.

Form A Type

Is this the Annual report or Termination report ?

Annual Report

Termination Report

To create annual reports click the **(Annual Report)** button.

OR

To create termination reports click the **(Termination Report)** button.

Annual Report

Expenses

Select current expense reports to import expenses to Annual/Termination report.

<input checked="" type="checkbox"/> All	FileNumber	FilingDesc	FilingTypeDesc	FilingStatus
<input checked="" type="checkbox"/>	LE20150011	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report
<input type="checkbox"/>	LE20150002	Form E - Mid-Session	Lobbyist Mid-Session Expense Report	Filed - Lobbyist Report
<input type="checkbox"/>				

Next

Cancel

1. Click on the [checkbox] to the left that corresponds with the expense reports you wish to import to the Annual or Termination report.
2. Click the **(Next)** button.



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::Lobbyist Annual Report

Lobbyist Compensation

Fee :

Salary :

Retainer :

Reimbursement :

Other :

Other Description :

Add/Edit Compensations

3. Add compensation by clicking the **(Add/Edit Compensations)** button.
4. Fill out the Lobbyist Compensation form.

Fee

Salary

Retainer

Reimbursement

Other

Other Description

Cancel Next

5. Click the **(Next)** button.



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6. To add administrative costs click the **(Add/Edit Administrative Costs)** button.

Lobbyist Administrative Costs

Overhead :

Support :

Employees who communicated with public officials :

Urging Others To Communicate :

Food and beverage, travel and lodging. DO NOT include Receptions :

Entertainment, gifts, anything of Value, loans, honorariums :

Add/Edit Administrative Costs

Fill out the Lobbyist Administrative Cost form and click the **(Next)** button.

Overhead	Urging Others To Communicate
<input type="text"/>	<input type="text"/>
Support	Food and beverage, travel and lodging. DO NOT include Receptions
<input type="text"/>	<input type="text"/>
Employees who communicated with public officials	Entertainment, gifts, anything of Value, loans, honorariums
<input type="text"/>	<input type="text"/>
<input type="button" value="Cancel"/>	<input type="button" value="Next"/>



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Expenses Actions-(Annual Report)

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button.


Expenses Actions		
Add Expenses	Import Expenses From Spreadsheet	Download Lobbyist Expense Template
Expense Items		


Add Expenses

5. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.




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Recipient <input type="text"/>	Recipient's Office Title Governor ▼
Date <input type="text"/> 	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award ▼
Item Description <input type="text"/>	Value/Cost <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Date
08/01/2014 

August 2014						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Type the date into the Date box or
click on the  calendar button to
bring up a calendar and select a
date.

6. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
7. After you click the **(Next)** button you will be taken back to the Annual Report page that shows your newly entered Expense Item.



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Expense Items

☐ Select All

	Recipient	Recipient's Office Title	Date	Place	Provider	Expense
<input type="checkbox"/>	DSA	Governor	Jan 19 2015	Test	DSA	Award
<input checked="" type="checkbox"/>	DSA	Treasurer	Feb 7 2015	DSA	DSA	Award

☐ Select All

Edit Expense

Remove Expense

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.



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Import from Spreadsheet

Expenses Actions

Add Expenses Import Expenses From Spreadsheet Download Lobbyist Expense Template

6. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.
7. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)**.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

8. Next you will come to a screen where you may choose a file from your computer

Please upload the Excel Template

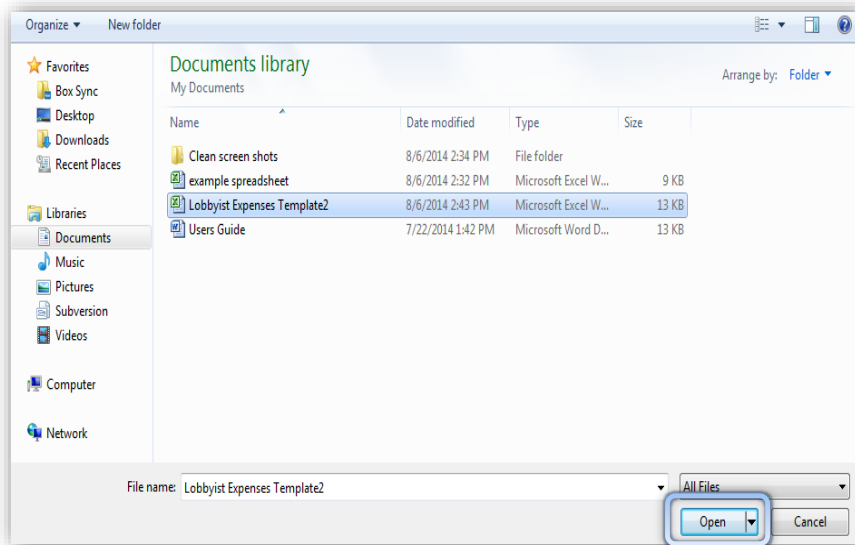
Upload Excel Sheet (Click Upload to Continue)

Choose File No file chosen Cancel

9. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.

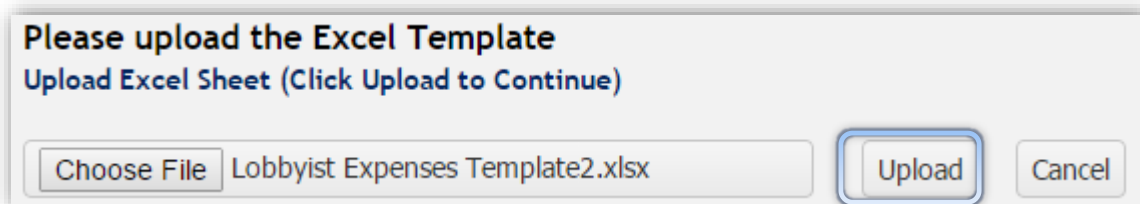


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Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.



10. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Annual Report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.

2. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.



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Reception Items

☐ Select All

	Date	Place/Location	Est. No. Public Officials	Est. Total At
<input type="checkbox"/>	Jan 19 2015	Mobile AL	1	1
<input checked="" type="checkbox"/>	Feb 5 2015	Jackson MS	500	10

☐ Select All

Edit ReceptionsRemove Receptions

3. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.



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Report Actions-(Annual Report)

1. You may see a preview of your annual report before submission by clicking the **(Preview Annual Report)** button. A separate window will open with a preview of your annual report.

A dialog box titled "Report Actions" with a dark blue header. Below the header, there are two buttons: "Preview Annual Report" and "Submit Annual Report".

Report Actions

Preview Annual Report Submit Annual Report

2. After reviewing the annual report for correctness, if you are ready to submit click the **(Submit Annual Report)** button. This will bring you to a Submit Report screen.

A dialog box titled "Submit Report". The text inside reads: "You are about to Submit Annual Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission." At the bottom, there are two buttons: "SUBMIT" and "CANCEL".

Submit Report

You are about to Submit Annual Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

SUBMIT CANCEL

3. Click the **(SUBMIT)** button.

A dialog box titled "Lobbyist Annual Report". The text inside reads: "Annual Report submitted." At the bottom right, there is an "OK" button.

Lobbyist Annual Report

Annual Report submitted.

OK

4. Click the **(OK)** button to finish.



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Termination Report

1. Go under the **Client(s)** tab on the online filings page.
2. Choose the Lobbying Year from the dropdown menu.

Client(s) Pending Client(s) Terminated Client(s) My Profile

Register A Client

Register Client(s)

You have 10 pending client(s)

Click '**Details**' link to review the registration and Create/Submit Lobbyist Reports.

Lobbying Year: **2015**

Certificate #	Description
Details 20150005	Lobbyist: Tara Lynn Kaeser ; Client: Dorger Software Te

3. This will display a list of Client Registrations for that year click on the **Details** link.
4. In order to create a termination report, click the **(Create Annual Report)** button.

File a Report Submitted Reports Registration Info

New Reports

Create Mid/End Session Report **Create Annual Report** Download Lobbyist Expense Template



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Form A Type

Is this the Annual report or Termination report ?

Annual Report

Termination Report

5. Click on the **(Termination Report)** button.
6. On the Expenses screen check the [checkbox] that corresponds with the expense report you wish to add to the Termination report.

Expenses

Select current expense reports to import expenses to Annual/Termination report.

<input type="checkbox"/> All	FileNumber	FilingDesc	FilingTypeDesc
<input type="checkbox"/>	LE20150011	Form E - Mid-Session	Lobbyist Mid-Session Expense Report
<input checked="" type="checkbox"/>	LE20150002	Form E - Mid-Session	Lobbyist Mid-Session Expense Report
<input type="checkbox"/>			

Next

Cancel

7. Click the **(Next)** button.



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::Lobbyist Termination Report

Lobbyist Compensation

Fee :

Salary :

Retainer :

Reimbursement :

Other :

Other Description :

Add/Edit Compensations

8. Add compensation by clicking the **(Add/Edit Compensations)** button.

Fee

Salary

Retainer

Reimbursement

Other

Other Description

Cancel Next

Fill out the Lobbyist
Compensation form.

Click the **(Next)** button.



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Lobbyist Administrative Costs

Overhead :

Support :

Employees who communicated with public officials :

Urging Others To Communicate :

Food and beverage, travel and lodging. DO NOT include Receptions :

Entertainment, gifts, anything of Value, loans, honorariums :

Add/Edit Administrative Costs

9. To add administrative costs click the **(Add/Edit Administrative Costs)** button.

Overhead <input type="text"/>	Fill out the Lobbyist Administrative Costs form, and click the (Next) button	Urging Others To Communicate <input type="text"/>
Support <input type="text"/>		Food and beverage, travel and lodging. DO NOT include Receptions <input type="text"/>
Employees who communicated with public officials <input type="text"/>		Entertainment, gifts, anything of Value, loans, honorariums <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>		



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Expense Actions-(Termination report)

- Here you may either add expenses directly by clicking the **(Add Expenses)** button or import your expense information by first downloading the Lobbyist Expense Template by clicking the **(Download Lobbyist Expense Template)** button. Once you fill out the Lobbyist Expense Template you may then import the expense information by clicking the **(Import From Spreadsheet)** button.

Expenses Actions		
Add Expenses	Import Expenses From Spreadsheet	Download Lobbyist Expense Template


Add Expenses


8. Click **(Add Expenses)** to add expenses into the Lobbying Expenditure on the next page.




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9. Type the recipient's name in the Recipient box and choose the Recipient's Office Title from the dropdown menu.

Recipient <input type="text"/>	Recipient's Office Title Governor ▼
Date <input type="text"/> 	Place <input type="text"/>
Provider <input type="text"/>	Expense Type Award ▼
Item Description <input type="text"/>	Value/Cost <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Type the date into the Date box or click on the  calendar button to bring up a calendar and select a date.

Date
08/01/2014 

August 2014						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

10. Click the **(Next)** button when you are finished filling out the Lobbying Expenditure.
11. After you click the **(Next)** button you will be taken back to the Termination Report page that shows your newly entered Expense Item.



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Expense Items

☐ Select All

Recipient	Recipient's Office Title	Date	Place	Provider	Expense Type	Item Description	Value/Cost
<input checked="" type="checkbox"/> Capt. Crunch	Judge	Feb 27 2015	Cereal Town	GM	Award	Frosted	\$50.00

☐ Select All

Total Value/Cost\$50
Expenses Count1

Edit ExpenseRemove Expense

- After you add expenses you may edit them if changes need to be made, or you may delete them. Click the [checkbox] next to the Recipient's name and click the **(Edit Expense)** or **(Remove Expense)** buttons. The **(Edit Expense)** button will take you back to the Lobbying Expenditure page where you may change the information entered. The **(Remove Expense)** button will delete the selected expense.



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Import from Spreadsheet

The image shows a horizontal menu bar titled "Expenses Actions". It contains three buttons: "Add Expenses", "Import Expenses From Spreadsheet" (which is highlighted with a blue border), and "Download Lobbyist Expense Template".

11. You may Import Expenses from a Spreadsheet by clicking on the **(Import From Spreadsheet)** button.
12. First you will need to have the Lobbyist Expenses Template downloaded. The Lobbyist Expenses Template can be downloaded by clicking the **(Download Lobbyist Expense Template)**.

To upload expenses using a spreadsheet you will need to download the Lobbyist Expenses Template.

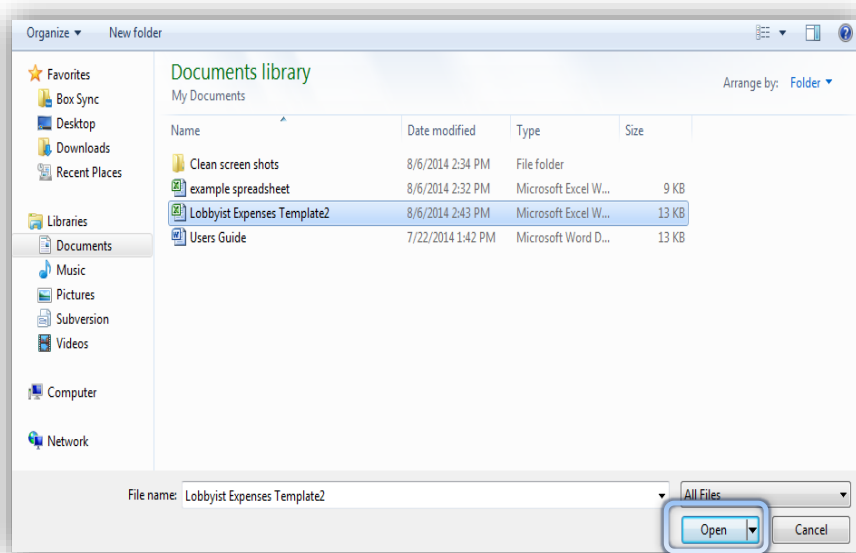
13. Next you will come to a screen where you may choose a file from your computer

The image shows a dialog box titled "Please upload the Excel Template". Below the title is the text "Upload Excel Sheet (Click Upload to Continue)". At the bottom, there is a button labeled "Choose File" next to the text "No file chosen", and a "Cancel" button on the right.

14. Click the **(Choose File)** button which will open a window where you may choose a file from your computer.



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Click on the Excel Sheet you wish to upload and click the **(Open)** button.

Next you should see the file you opened in the **Choose File** box and an **(Upload)** button has appeared.



15. Click the **(Upload)** button to import your Excel Sheet.



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Receptions Actions-(Termination report)

1. Click the **(Add Receptions)** button to go to a page with a *Lobbyist Receptions* form to fill out.


Receptions Actions

Add Receptions

Reception Items

Date <input type="text"/> 	Est. Number of Public Officials <input type="text"/>
City <input type="text"/>	Est.Total Attendance <input type="text"/>
State <input type="text"/>	Total Reception Cost <input type="text"/>
Establishment <input type="text"/>	
<input type="button" value="Cancel"/>	<input type="button" value="Next"/>



2. Type the date into the Date box or click on the  calendar button to bring up a calendar to select a date.
3. Fill in the rest of the boxes
4. Click the **(Next)** button when you are finished.



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5. After you click the **(Next)** button you will be taken back to the Form E Expense Report page that shows your newly entered Reception Action.

☐ Select All

Date	Place/Location	Est. No. Public Officials	Est. Total Attendance	Total Reception Cost
<input checked="" type="checkbox"/> Feb 4 2015	Jackson MS	50	20	\$10
<input type="checkbox"/> Feb 28 2015	Jackson MS	850	1000	\$1230

☐ Select All

Total Receptions Cost
Receptions Count

Edit ReceptionsRemove Receptions

6. Once you add receptions actions you may edit them if changes need to be made, or you may delete receptions actions. Click the [checkbox] next to the date and click the **(Edit Receptions)** or **(Remove Receptions)** buttons. The **(Edit Receptions)** button will take you back to the Lobbyist Receptions page where you may change the information entered. The **(Remove Receptions)** button will delete the selected expense.



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Report Actions – (Termination report)

1. You may see a preview of your termination report before submission by clicking the **(Preview Termination Report)** button. A separate window will open with a preview of your annual report.
2. After reviewing the termination report for correctness, if you are ready to submit click the **(Submit Termination Report)** button. This will bring you to a Submit Report screen.

Report Actions

3. A Termination Report submission cannot be reversed.

Submit Report

You are about to Submit Termination Report. This process can not be reversed. Please click 'SUBMIT' if you wish to Submit the report or click 'CANCEL' to abort the Submission.

4. Click the **(SUBMIT)** button if you are ready to submit or click the **(CANCEL)** button if you are unsure.